FY23 Grant Workshop
February 22, 2023
8:30 am – 11:45 am EST

Strengthening Ohio Communities through Service and Volunteerism.

Welcome

Review Agenda

Introductions

Strengthening Ohio Communities through
Service and Volunteerism.

Agenda

- 8:30 am – 9:45 am
  - In-Depth Review of NOFO
- 10-10:45 am
  - Budget Preparation & Requirements
- 11-11:45 am
  - Performance Measures, Application Process and Questions

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Introductions

- Mary Cannon, Director of AmeriCorps
- Meredith Pugh, Grants Manager

Objectives

- Discuss details of the application components and process;

- Provide budgeting requirements for an AmeriCorps program:

- Share characteristics of successful proposals.

References

https://serve.ohio.gov/grants-and-funding/americorps-funding

- Notice of Funding Opportunity (NOFO)
- Application Instructions
- Mandatory Supplemental Information
- Intent to Apply
- Financial Management Survey

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Ohio AmeriCorps Grants

- Funding from the federal AmeriCorps agency and administered by the Ohio Commission on Service and Volunteerism (ServeOhio).

- Direct service by members is a key cornerstone of the overall program model;

- Strengthening capacity of non-profit and community-based organizations, particularly through volunteer engagement;

2023 Funding Priorities

FY23 Funding Priorities

- Organizations leading service in communities with concentrated poverty, rural communities, tribal communities, and those organizations serving historically underrepresented and underserved individuals, including but not limited to communities of color, immigrants and refugees, people with disabilities, people who identify as part of the LGBTQIA+ community, people with arrest and/or conviction records, and religious minorities;

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FY23 Funding Priorities

- Programs that create workforce pathways for AmeriCorps members, including deliberate training, certifications, and hiring preferences or support.

- Activities that support educational opportunity and economic mobility for communities experiencing persistent unemployment or underemployment, and students experiencing homelessness or those in foster care.

- Efforts to increase access, information and/or resources to safe, healthy, affordable, and/or more efficient housing.

FY23 Funding Priorities

- Programs that reduce and/or prevent prescription drug and opioid abuse; Increase access to health information/knowledge, resources and/or services; Improve individual and/or community health conditions.

- Programs that improve the quality of life of veterans and improves the well-being of military families, caregivers, and survivors.

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FY23 Funding Priorities

- Rural intermediary organizations that demonstrate measurable impact and primarily serve rural communities with limited resources and organizational infrastructure.

- Efforts to mobilize volunteers to meet regional community needs utilizing ServeOhio's Get Connected platform.

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Application Priorities

- AmeriCorps member roles and activities that are direct service oriented and clearly demonstrate engagement in and with the community.
    - Prohibited Activities are not proposed!
    - *Hint: there's a list in the 45 CFR § 2520.65*

- Applications that demonstrate alignment with the organization's mission, need, service activity and measurements

Application Priorities

- Evidence-Based or Evidence-Informed programs focusing on measureable outcomes

- Innovative strategies and programs that engage more citizens in national service and volunteerism, providing opportunities to solve real world problems; and

- Evaluation and performance management is a focus of the program and organization

Eligible Applicants

- Nonprofit Organizations
  - Community/Regional/Statewide
  - Faith-based
  - Secular
- Government
  - State/County/Local
- Education
  - Districts, Collaborative, Higher Education
- Partnerships such as Intermediary or Consortium

Eligible Applications

- No less than **5 Member Service Years (MSY)**
  - **1 MSY = 1 Full-time Member (1.0 MSY)**
  - **1 MSY = 2 Half-Time Members (.5 +.5 MSY)**

- Cost per MSY is not exceeded.
  - See NOFO, page 7

- Page limitations followed
  - See NOFO, page 12

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Grant Types	Cost Reimbursement	Fixed Amount			
Available Subtypes	Traditional	Full-Cost	Education Award Program (EAP)	Professional Corps See MSI found here for further requirements	No Cost Slots
Maximum Cost per MSY*	**$28,800**	**$28,800**	**$800 or $1,000*****	**$1,000**	**$0**
Type of Slots in the National Service Trust**	FT, TQT, HT, RHT, QT, MT, AT	FT, TQT, HT, RHT, QT, MT, AT	FT, TQT, HT, RHT, QT, MT, AT	FT Only	FT, TQT, HT, RHT, QT, MT, AT
Budget Submission Required	Yes	No		No	No
Availability of Funds linked to enrollment and retention of awarded MSYs	No	Yes			No
Special Requirements	N/A	N/A		Must place qualified professionals in communities with an inadequate # of such professionals. Member salaries & benefits must be paid entirely by organization where member serves & not included in budget.	N/A
Financial Reporting Requirements	Yes	No			
Available to new Applicants	Yes	YES***	Yes		

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Eligible Applications

- Minimum Match Requirement Met
  - Cost-reimbursement grant specific
  - See NOFO, page 10

AmeriCorps Funding Year	1, 2, 3	4	5	6	7	8	9	10+
Grantee Share Requirements	24%	26%	30%	34%	38%	42%	46%	50%

Eligible Applications

- Living Allowance requirements met
    - See NOFO, page 15

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Service Term	Minimum # of Hours	Minimum Living Allowance*	Maximum Total Living Allowance
Full-time (1.0 MSY)	1,700	**$17,600**	**$35,200**
Three Quarter-time (.7 MSY)	1,200	*$12,425*	**$24,640**
Half-time (.5 MSY)	900	*$9,320*	**$17,600**
Reduced Half-time (.381 MSY)	675	*$6,980*	**$13,376**
Quarter-time (.265 MSY)	450	*$4,660*	**$9,152**
Minimum-time (.212 MSY)	300	*$3,105*	**$7,392**
Abbreviated-time (.056 MSY)	100	*$1,035*	**$2,112**

*AmeriCorps programs are not required to provide a living allowance to members serving in less than full-time capacity.
ServeOhio recommends programs provide at least the minimum living allowance listed in the above Table.

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Eligible Applications

- Complete application with <u>additional documents</u>
  - See NOFO, page 17-18

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Additional Documentation varies depending on type of application:

Additional documents required of **ALL** applicants
1. Evaluation briefs, reports, studies. Please refer to the [Evidence Base section](#) and [Mandatory Supplemental Information found here](#) for detailed instructions by evidence tier. If multiple evaluation briefs/reports/studies are submitted by the applicant, the most recent (as measured by the date of completion or publication) will be reviewed first, and any documents submitted beyond the allowable number will not be reviewed.
2. Labor union concurrence (if applicable)
3. All applicants regardless of funding level are required to submit [an Operational and Financial Management Survey (OFMS).](#) Please submit the OFMS as a Word document. Forms submitted as a PDF or any other document format may not be accepted.
4. If applicable, a copy of the organization's indirect cost rate agreement
5. If applicable, a match waiver request
6. If applicable, an alternative match schedule request

New applicants, or applicants that have not received an Ohio AmeriCorps grant in last three years, must submit the following in addition to the above items, as applicable:
1. Organizational Chart that includes the AmeriCorps program
2. [Ohio AmeriCorps Organizational Management Readiness Assessment found on the ServeOhio website](#).

Recompete applicants who have previously received three or more years of competitive funding for the same project being proposed must submit the following:
1. Evaluation plan. Please use the evaluation plan template found [available on the ServeOhio webpage.](#) Evaluation plans are not scored and will not be reviewed until after funding decisions are made.

Recompete applicants who have previously received six or more years of competitive funding for the same project being proposed must submit the following:
1. Evaluation report. Please submit in Microsoft Word. The evaluation report should include a title page with the AmeriCorps grant number for the project that was evaluated, the name of the project, and the date of completion of the report. If any of this required information is missing, the applicant may not receive credit for meeting their evaluation requirements.

Serve.ohio.gov

IMPORTANT

Active registration in SAM.gov required

Applicant needs a Universal Employer Identification number by registering in SAM.gov.

Both required to have an eGrants account and can take multiple weeks!

Grant Selection Criteria

- Executive Summary
- Program Design
- Organizational Capability
- Cost Effectiveness & Budget

Application Review Information begins on page 20 in the Notice of Funding Opportunity

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A. Executive Summary

Use the template provided on page 20 of the NOFO!

Do this last after all sections are complete.

The [ABC Logistics] will have [20] AmeriCorps members who will [provide outreach and education on mental health resources] in [the city of Elm]. At the end of the first program year, the AmeriCorps members will be responsible for [increasing residents' knowledge about mental health resources]. In addition, the AmeriCorps members will leverage [100 volunteers] who will be engaged in [National Days of Service.]

The AmeriCorps investment will be matched with $[87,348], $[37,348] in public funding and $[50,000] in private funding.

B. Program Design

1a. Theory of Change

Need ➡ Intervention ➡ Intended Outcome

– Summary of issue/need

– Intervention is how/what/when/where members provide service along with research that it will lead to proposed outcome

– Intended outcome describes success as a result of the intervention

1a. Theory of Change

The Theory of Change shall address:
- The problem is prevalent and severe in communities where the program plans to serve and has been documented with relevant data.
- The proposed intervention is responsive to the identified community problem.
- The applicant's proposed intervention is clearly articulated including the design, dosage, target population, and roles of AmeriCorps members and (if applicable) leveraged volunteers.
- The applicant's intervention is likely to lead to the outcomes identified in the applicant's Theory of Change.
- The expected outcomes articulated in the application narrative and Logic Model represent meaningful progress in addressing the community problem identified by the applicant.
- The rationale for utilizing AmeriCorps members to deliver the intervention(s) is reasonable.
- The service role of AmeriCorps members will produce significant contributions to existing efforts and help develop additional capacity to address the stated problem.

Theory of Change

- Applicants should discuss the community need as it relates to the CDC's Social Vulnerability Index.

- Applicants should discuss their rationale for determining output and outcome performance measure targets.

- Rationales and justifications should be informed by the organization's performance data (e.g., program data observed over time that suggests targets are reasonable), relevant research (e.g. targets documented by organizations running similar programs with similar populations), or prior program evaluation findings.

1b. Logic Model

- The Logic Model is a visual representation of the applicant's Theory of Change.

- Programs should include short or medium and long-term outcomes in the Logic Model.

The Logic Model shall depict:
- A summary of the community problem, including the role current or historical inequities faced by underserved communities may play in contributing to the problem.
- The inputs or resources that are necessary to deliver the intervention, including but not limited to:
  - Number of and/or specific locations or sites in which members will provide services
  - Number of AmeriCorps members who will deliver the intervention
  - Start and End Dates of AmeriCorps service terms
- The core activities that define the intervention or program model that members will implement or deliver, including:
  - The duration of the intervention (e.g., the total number of weeks, sessions or months of the intervention)
  - The dosage of the intervention (e.g., the number of hours per session or sessions per week)
  - The target population for the intervention (e.g., disconnected youth, third graders at a certain reading proficiency level)
- The measurable outputs that result from delivering the intervention (i.e., number of beneficiaries served, types and number of activities conducted, equity gaps closed). If applicable, identify which National Performance Measures will be used as output indicators
- Outcomes that demonstrate changes in knowledge/skill, attitude, behavior, or condition that occur as a result of the intervention. If applicable, identify which National Performance Measures will be used as outcome indicators.

Logic Model

- Follow guidance from the NOFO, page 21-22.

- No more than 3 pages as it prints out
  - it will become the final pages of your printed application

- Generally, short or medium-term outcomes are measures within a program year.
  - Identify which, if any, National Performance Measures will be used as output and/or outcome indicators.

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Logic Model

- Applicants with multiple interventions should complete one Logic Model chart which incorporates each intervention.
  - No more than 3 total pages

- There is a template of the Logic Model available on the ServeOhio AmeriCorps Funding webpage.

AmeriCorps Logic Model Template

Problem	Inputs	Activities	Outputs	Outcome(s) Short-Term	Outcome(s) Medium-Term	Outcome(s) Long-Term
The community problem the program activities (interventions) are designed to address	Resources necessary to deliver the interventions, including # of service locations/sties and #/type of AmeriCorps members	The core activities that define the intervention, or program model, the members will implement or deliver. Includes the duration, dosage and target population.	Direct products from delivering the intervention	Changes in knowledge, skills, attitudes and opinions and will be, almost always, measurable during the grant year.	Changes in behavior or action. Depending on the program design, may be measureable in the program year.	Changes in condition or status in life. Depending on the program design, may be measureable in the program year such as environmental or capacity-building programs.

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Example for health literacy program

INPUTS	ACTIVITIES	OUTPUTS	Outcomes		
			Short-Term	Medium-Term	Long-Term
What we invest	What we do	Direct products from program activities	Changes in knowledge, skills, attitudes, opinions	Changes in behavior or action that result from participants' new knowledge	Meaningful changes, often in their condition or status in life
Funding

4 FT staff

5 AmeriCorps members serve as health care coaches 9/1/21-8/31/22

Partnerships with 5 community-based organizations

Member training | For eligible residents in Elm City within Tacoma County
1) Develop and disseminate health and safety information 8 hours per week
2) Conduct health literacy workshops 8 hours week
3) Provide individualized health literacy sessions 24 hours per week | 500 health and safety education materials disseminated

4 half-day workshop sessions (at least 20 residents per session; 80 total)

100 individual and small group health literacy sessions (60 mins each) serving 300 people (H4A)* | Increase in residents' understanding of prevention and self-management of conditions (H17)*

Increase in residents' motivation to adopt good health practices

Increase in residents' ability to search for and use health information | Increase in residents' adoption of healthy behaviors and recommendations of the program (such as getting necessary medical tests) | Improved health and wellness status and quality of life for residents in the area |

AmeriCorps Logic Model Template

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AmeriCorps Logic Model - PowerPoint presentation

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2. Evidence Base Section

- Two components to this section -
  - Evidence Tier (See the <u>MSI</u>)
  - Quality of Evidence –based on referenced evidence

- Evidence Tier: Applicants must fully describe how they meet the requirement of their level.
  - Pay attention to requirements for each tier of evidence
  - Submit evaluation reports, if required by Tier

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Evidence Tiers

- Pre-Preliminary/Evidence-Informed - using relevant, recent data.

- Preliminary - can submit outcome reports, if available

- Moderate*- Requires submission of evaluation reports

- Strong*- Requires submission of evaluation reports

Details in the Mandatory Supplemental Information pgs. 3-4

summarize studies and key findings of any report(s) submitted and describe any other evidence that supports the program design, including past performance measure data and/or other research studies that inform their program design.

3. Notice Priority

- If applicable, specify which funding priority the program fits
  - NOFO and MSI

- Detail that the program meets all of the requirements.

- No more than a <u>few sentences</u>

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4. Member Experience

- AmeriCorps members' service will provide them opportunities to develop as leaders.

- AmeriCorps members will gain skills that can be utilized and valued by future employers after service

- Detailed plans to recruit AmeriCorps members from geographic or demographic communities in which the program operates.

- Description of how the organization will ensure its project engages a diverse and inclusive group of members.

C. Organizational Capability

1. Background and Staffing

- The organization, and staff listed, has the experience, staffing, and management structure to plan, implement, monitor and oversee the proposed program.

- Include any experience with education or workforce development programs

- Commitment to DEI in its strategic plan or focus and seen in staff and/or leadership.

- If the budget does not include .5FTE staff allocated to the grant, include a rationale to support this decision.

If a new applicant is requesting a Full Cost Fixed Amount grant…

- The organization's experience managing a federal award

- Any prior experience with AmeriCorps grants and/or programs

- Detail the sources of match and/or funding plan

- Detail how the organization has the fiscal capacity to manage an AmeriCorps grant and federal requirements.

2. Compliance and Accountability

- Detail monitoring and oversight plan to include
  - Host site visits
  - Supervisor check-ins/meetings
  - Member visits/check-ins on site at service locations

- Policies, procedures, plan to prevent, detect and respond to non-compliance
  - Internal oversight and/or separation of duties

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3. Member Supervision

- AmeriCorps members will receive sufficient guidance and support from their supervisor to provide effective service.
  - Supervisor networking and ongoing support
  - Regular conference calls/webinars/visits
- AmeriCorps supervisors will be adequately trained/prepared to follow AmeriCorps and program regulations, priorities, and expectations

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D. Cost Effectiveness & Budget Adequacy

- Criteria assessed based on the submitted budget and complies with budget requirements

- "See Budget" is only required narrative in this section

Cost Effectiveness & Budget Adequacy

The budget is clear, reasonable, cost-effective, and in alignment with the program narrative.

- The requested funds follow MSY requirements

- Submitted without errors

- Compliant with budget instructions

- Living allowance requirements met

- **The amount requested is a competitive factor in the selection process.**

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Cost Effectiveness
& Budget Adequacy

Additional Documentation:

- Financial Management Survey

- Indirect cost rate, if applicable

<u>Financial Management Survey</u>

- Determine your organization's capacity for managing federal funds.

- Experience with federal grants and other funding.

- Financial accounting system.

- System of internal controls.

- Current written policies and procedures.

Other Narrative Sections

- Evaluation (Renewals required to submit plan via additional document)

- Amendment Justification

- Clarification Information

- Continuation Changes
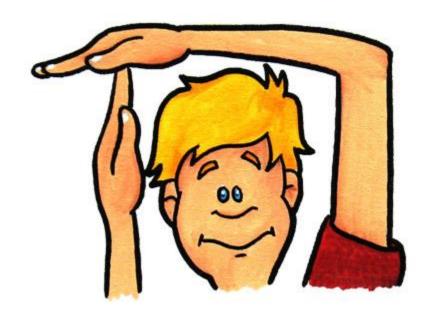
Enter **N/A** into each of the above sections

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Additional Documentation

- Due by the application deadline
  - **April 5, 2023 by 5:00 pm EST.**
  - <u>Email</u> via the instructions in NOFO, pages 17-18

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TAKE A BREAK!

RETURN AT 10:00 AM FOR BUDGET PREPARATION

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Welcome!

Performance Measures
Best Practices
Question and Answers

Demonstrating Success

- All programs are required to submit at least one **performance measure** to track the program's *primary* service activity <u>for one year</u>.
  - Output
  - Outcome
- <u>2023 Performance Measures Instructions</u>
  - Find the RIGHT fit for your program
- Can use Applicant Determined Measures

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Performance Measures

- [Review National Performance Measures Instructions](#)
  - Connect with the program's Logic Model in the Output and Outcome.
  - Target Numbers for one year – how selected?
  - Tracking tools – survey? access to data?
  - Who is tracking and reporting?

Entering Performance Measures

- For the mechanics of going through the performance measure section in eGrants, see the <u>Application Instructions, Attachment A, page 16</u>

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Questions?

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eGrants NOFA

- Select based on the grant type which is either Cost Reimbursement (Planning too) or Fixed Amount

- **Cost Reimbursement Grant**
  - FY 2023 AmeriCorps State and Territory Commission (New and Cont)
  - **23AC254669**
  - ❖ *Ignore the Due Date: 01/04/2023*

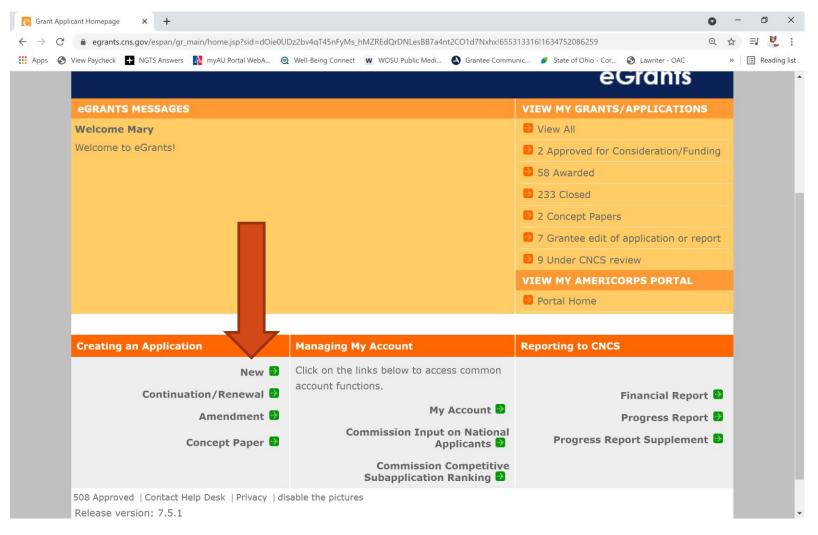⟶ ◯ **FY 2023 AmeriCorps State and Territory Commission (New and Cont)**

Due Date: 01/04/2023

Summary: This application is for new, recompeting, or continuation state commission applicants, including territories with commissions, applying for cost reimbursement grants.

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eGrants NOFA

- Select based on the grant type which is either Cost Reimbursement (Planning too) or Fixed Amount

- **Fixed Amount Grants**
  - FY 2023 AmeriCorps State and Territory Commission Fixed and EAP (New or Cont)
  - **23ES254670**
  - ❖ *Ignore the Due Date: 01/04/2023*

⊙ **FY 2023 AmeriCorps State and Territory Commission Fixed and EAP (New and Cont)**
Due Date: 01/04/2023
Summary: This application is for new, recompeting, or continuation state commission applicants, including territories with commissions, applying for fixed amount and EAP grants.
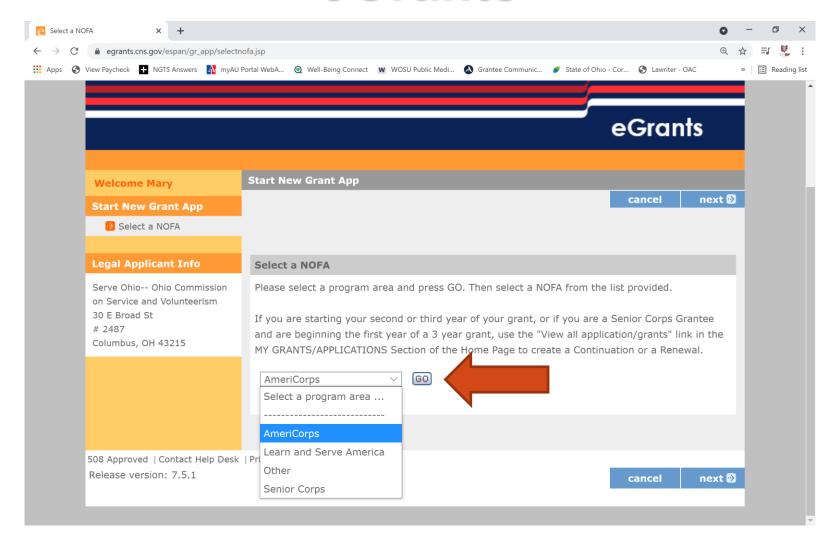
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eGrants

eGrants

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eGrants – *ignore* 1/4/2023 date

○ **FY 2023 AmeriCorps National Direct (New and Continuations)**
Due Date: 01/04/2023
Summary: This application is for new, recompete, or continuation multi-state applicants requesting cost-reimbursement grants.

○ **FY 2023 AmeriCorps State and Territory Commission (New and Cont)**
Due Date: 01/04/2023
Summary: This application is for new, recompeting, or continuation state commission applicants, including territories with commissions, applying for cost reimbursement grants.

○ **FY 2023 Public Health AmeriCorps Commission (New and Cont)**
Due Date: 01/04/2023
Summary: This application is for new and continuation state commission applicants, including territories with commissions, applying for Public Health AmeriCorps grants.

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eGrants Review

eGrants

egrants.cns.gov

Characteristics of Success

- Programs focusing on measurable outcomes
- Innovative strategies and programs that engage more citizens in national service and volunteerism
- Leverage multiple resources
- Focus on service as a solution and instilling the ethic of service in AmeriCorps members and volunteers
- Capacity, commitment, and administrative leadership

Characteristics of Success

- Engaging citizens in solutions

- Corps has a central focus - cohesion and shared service experiences are a priority

- Focus on sustainability

- Member development important part of the experience and program; strong plan for professional development and communication

- The AmeriCorps program is designed to build organizational capacity – not replacing or duplicating efforts

Characteristics of Success

- Staff time and professional development
- Maintaining regular communications with partners and service sites
- Success shared at all levels
- Training occurs at all levels
- Value evaluation
- Preparation is key!

Organizational Capacity

- Fiscal
- Staffing
- Space
- Technology

- Leadership – HR and Legal
- Partners
- Tracking and Reporting
- Member Management

Caution

- **Mission drift**
- **Significant human resources added to the organization**
- **Significant commitment on the part of the organization**
- **Leverage existing efforts**
- **AmeriCorps is not cheap labor**

Items to Mention

- READ the <u>Notice of Funding Opportunity</u>

  – Application review criteria

  – Be sure to submit all required additional documentation

- READ the <u>Application Instructions</u>

Steps To Apply

- Register, or update, organization's SAM registration

- Make sure your organization has a Unique Employer Identification Number (UEI)

- Establish an eGrants account

All contact information MUST MATCH across systems.

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Application Timeline

- Intent to Apply for feedback – 3/10/23 @ 5:00pm

- Black-Out Period from **3/29-4/23/23**

- Apply through <u>eGrants</u> and submit documentation by **April 5, 2023 @ 5:00pm EST**

- Applications are Peer and Staff Reviewed

- Clarification period is 4/24-5/5/23

- Commission Meeting – May 11, 2023

- Award Notification – after May 12, 2023

- Fall - Programs begins after August 1, 2023

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Resources

- [Ohio AmeriCorps Funding webpage](#)
- [AmeriCorps Website](#)

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For More Information on Program Requirements:

Information on program requirements and criteria are located in the AmeriCorps regulations, 45 CFR §§ 2520-2550

www.gpoaccess.gov/ecfr and

www.americorps.gov/rulemaking

WHAT QUESTIONS DO YOU HAVE?

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Serve.ohio.gov

Follow-Up Questions

- **Mary Cannon,** Director of AmeriCorps
  –mary.cannon@serve.ohio.gov

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